

Trident for Procurement User Guide

Step-by-step tasks for buyers, suppliers and administrators. Labels in bold are the names you see on screen. Screens show sample data.

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Get started

Sign in

1. Open the Trident for Procurement link from your administrator in a web browser.
2. Sign in with your SAP BTP account. If an invitation is waiting for your email address, it is accepted the first time you sign in.
3. The **Dashboard** opens. It shows quick actions and activity for your role.

To sign out, use the **Sign out** icon in the header.

Roles		
ROLE	WHO	WHAT YOU CAN DO
Buyer	Procurement leads, category managers	Create projects, invite suppliers, evaluate and award proposals, run buyer skills, see SAP Ariba and SAP S/4HANA data, review findings, propose and approve write-backs
Supplier	Supplier representatives	See projects you are invited to, submit proposals, run bid response drafting and contract compliance check, take part in Q&A
Admin	Your Trident administrators	Everything a buyer can do, plus users, connections to SAP systems, MCP servers, AI model, procurement policies, the observer and the audit trail

If you have more than one role, pick one from the **Role:** list in the header. The menu, projects, skills and library change to match. The left menu shows only the screens your role can use.

Set up a project

A project is one sourcing process between your organization and one or more suppliers.

Create a project

1. Go to **Projects** and select **New Project**.
2. Enter the **Project Title** and choose the **Buyer Organisation**.
3. Optionally choose a **Department** and **Program**. Create them first with **New Department** and **New Program**.
4. Choose the **Industry**: Generic, Life Sciences, Oil & Gas or Aerospace & Defense. This turns on the matching industry profile.
5. Paste the **RFP Text**, or upload a .docx, .pdf, .xlsx, .pptx or .txt file to extract the text.
6. Optionally set a **Deadline**, then select **Create Project**.

Start from an SAP Ariba sourcing event

1. In **New Project**, expand **Import from SAP Ariba (Optional)**.
2. Refresh the event list and choose an event. Only events that are not yet linked to a project and not awarded, closed or cancelled are listed.
3. The title, RFP text and deadline are filled in from the event. Check them, then select **Create Project**. The project is linked to the event.

To link an existing project, open it and select **Link Ariba Event in External Systems**.

Set the scoring template

1. Open the project and expand **Evaluation Scoring Template**.
2. Edit each **Criterion**, its **Weight %** and **Description**. Use **Add criterion** for more, up to 12.
3. Make sure the weights add up to 100, then select **Save template**.

Without a saved template, the project uses the default template. Proposal scoring and RFP drafting use the project's template.

Invite suppliers

1. Open the project and select **Invite Supplier**.
2. Select **Invite** next to a registered supplier, or enter an **Organisation Name** and optional contact email under **Invite a New Supplier** and select **Register & Invite**.
3. Track each supplier in **Submission Status**: Invited, Active, Submitted or Declined.

Answer questions in Q&A

1. In **Q&A Thread**, choose the message type and the recipient: **All Suppliers** or one supplier. A message to one supplier is marked **Private**.
2. To draft an answer, type the question and select **Ask AI**. Review the answer, its confidence and its library sources, and edit it if needed.
3. Select **Post to Thread**, or **Post for Review** to keep it visible to buyers only. A message held for review is sent with **Approve & Broadcast**.

Move a project through its status

1. In the project header, choose a status: Draft, Open, Closed, Awarded or Archived.
2. Select **Save**. Use the **Status** filter on **Projects** to find projects by status.

Evaluate, compare and award

Evaluate a proposal

1. Open the project. Submitted proposals are listed in **Proposals**.
2. Select **Evaluate** on a proposal. Trident scores it against the project's scoring template.
3. Read the **AI Evaluation**: the score, a recommendation, a next step and key risks.

Compare proposals

1. Select **Compare** in **Proposals**. You need at least two proposals.
2. The **Proposal Comparison** shows each supplier's score and recommendation, and a **Criteria Breakdown** with evidence and gaps per criterion.
3. Evaluate any proposal marked **Not yet evaluated** to include it.

Award the contract

1. Select **Award** on the winning proposal and confirm in **Award Contract**.
2. The project status changes to Awarded. The RFP and winning proposal are added to the supplier's document library.

Write the result back to SAP

1. On an awarded project linked to an SAP Ariba event, select **Push Award to Ariba** in **External Systems**.
2. To create a purchase order, select **Create S/4HANA PO**, check the **Contract Value**, currency and **Description**, and select **Review**.
3. Both open a review. Nothing is written until the write-back is approved. See [Approve actions](#).

Run a skill

Skills run on their own, outside the project steps above. Every skill searches the document library and lists the sources it used.

Run any skill

1. Go to **Skills** and open the skill's tab. Your role decides which tabs you see.
2. Optionally choose a project in **Load from Project**, and a proposal if asked. Fields are filled in from the project; edit them if needed.
3. Fill in the required fields (marked *). Use **Upload** to extract text from a .docx, .pdf, .xlsx, .pptx or .txt file.
4. Choose the **Industry** to apply its profile, then run the skill.
5. Review the result and open **library sources used** to see which documents it drew on. Download the result where a download button is shown.

The ten skills			
TAB	ROLE	YOU PROVIDE	YOU GET
01 Analyse RFP	Buyer	RFP text, industry, buyer name, category	Requirements and risk flags. Download .docx
02 Draft RFP	Buyer	Procurement requirements, category, budget range, timeline, special requirements	A full RFP with evaluation scorecard and appendices. Download .docx, Copy as Markdown
03 Evaluate Proposal	Buyer	Proposal text, criteria (or the project's template), RFP context, supplier name	Score per criterion with evidence and gaps, risks, clarification questions, next steps. Download .docx
04 Compare Vendors	Buyer	RFP context, criteria, two or more vendors and their proposals	Ranked vendors with scores
05 Check Compliance	Buyer, supplier	Contract text, contract type, counterparty, industry	Risk score, policy items with status and suggested redlines. Download .docx

TAB	ROLE	YOU PROVIDE	YOU GET
06 Draft SOW	Buyer	Project description, vendor, RFP requirements, evaluation summary	A statement of work (SOW) with sections, key commitments and open items
07 Review SOW	Buyer	SOW or contract text, RFP requirements, gaps to check	Readiness score, findings, open-items log, requirement traceability. Download Report (.docx), Download Open Items (.xlsx)
08 Draft Response	Supplier	RFP section, supplier profile, tone (consultative, formal or technical)	An editable response section with suggested evidence
09 Negotiation	Buyer	SOW or contract text, open items	Strategy, must-hold positions, negotiation points, recommended concessions
10 Award Letter	Buyer	Vendor, project description, evaluation score, key commitments	Letter text, key dates, next steps

Some skills lead to the next one. In **Review SOW**, select **Get Negotiation Guidance** to open **Negotiation** with the vendor, buyer and open items filled in. From **Negotiation**, **Draft Award Letter** opens **Award Letter** the same way.

You can also run RFP analysis on a synced sourcing event from **SAP Ariba (Analyse)**, and a compliance check on a synced contract (**Check**). Skills can be run from Joule for customers who use it, but it isn't required or the default.

Trident for Procurement

Role: Admin | User: Lou Gomez

Dashboard

Projects

Analytics

Skills

Document Library

Organisations

Users

SAP Ariba

SAP S/4HANA

Agent Activity

Audit Trail

Settings

User Guide

Procurement Skills

Category: Pipeline Integrity Services

Skills: Analyse RFP

Requirements

Risk Flags

Sample data

Analyse RFP: requirements and risk flags.

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Procurement Skills

Contract Text

Compliance Result

Risk Score

Policy Items

Sample data

Check Compliance: status, risk score and redlines.

Review agent findings

The observer syncs SAP Ariba and SAP S/4HANA, and the reasoner checks the changes against your procurement policies. Each finding has a severity, the reason, and the policy rule and version that raised it.

Work through findings

1. Open **Agent Activity**, or select **Open Agent Activity** in the attention strip on the **Dashboard**.
2. On the **Findings** tab, filter by Open, Acknowledged, Resolved or All.
3. Read **Why** for the reason and recommended next step.
4. Select **Acknowledge** when you have seen it, or **Resolve** when it is dealt with. If a finding has a proposed write-back, select **Review write-back**.

What raises a finding

- An SAP S/4HANA purchase order above the review threshold
- A new SAP S/4HANA business partner
- A new or changed SAP Ariba contract, or one inside the expiry window
- A new SAP Ariba sourcing event not linked to a project, or one closing soon
- A linked SAP Ariba event that is out of step with its project. This also proposes a write-back

The **Runs** tab lists each observer run, what started it and how many observations it found.

Severity	Finding	Why	Policy	Action
Medium	SAP Ariba event EVT-SIM-7355 closes in 5 day(s) and isn't tracked as a Trident project Oct 21, 2026, 2:08 PM	Close date 2026-10-26 is inside the 7-day window. Import it as a project so bids can be scored and compared before it closes.	event_closing_untrack Policy v0	Acknowledge Resolve
High	PO 4500-9F2E7 (AUD 2,750,000.00) is above the review threshold Oct 21, 2026, 2:08 PM	Net value AUD 2,750,000.00 exceeds the policy threshold of 1,000,000. Check the PO against the awarded contract value and budget before goods receipt.	po_over_threshold Policy v0	Acknowledge Resolve
Info	New SAP Ariba sourcing event: Hydraulic Pump Replacement – Processing Train 2 (EVT-SIM-7355) Oct 21, 2026, 2:08 PM	A sourcing event appeared in SAP Ariba that isn't linked to a Trident project. Import it as a project, or analyse the RFP.	new_sourcing_event Policy v0	Acknowledge Resolve
Medium	Contract CNT-2024-0152 with CoreBridge Solutions expires in 71 day(s) Oct 21, 2026, 2:07 PM	End date 2026-12-31 is inside the 90-day expiry window. Decide whether to renew, renegotiate or re-source, and start the process now.	contract_expiring Policy v0	Acknowledge Resolve
Medium	Contract CNT-2024-0118 with DeepDrill Technologies expires in 71 day(s) Oct 21, 2026, 2:07 PM	End date 2026-12-31 is inside the 90-day expiry window. Decide whether to renew, renegotiate or re-source, and start the process now.	contract_expiring Policy v0	Acknowledge Resolve

Sample data Agent Activity: open findings with the policy rule behind each one.

Approve actions

Write-backs to SAP are proposed first and carried out only after approval: push an award or close an event in SAP Ariba, or create a purchase order in SAP S/4HANA.

Approve or reject a write-back

1. Open **Agent Activity** › **Approvals**, or select **Review** in the "waiting for approval" strip on the project.
2. Check the values in the review: for example the SAP Ariba event, awarded supplier and award date, or the supplier, business partner, amount and description of a purchase order.
3. Optionally add a note for the audit trail.
4. Select **Approve and write to SAP Ariba** (or SAP S/4HANA), **Reject**, or **Not now** to decide later.

When an approval is stopped

- **Four-eyes approval:** if your administrator has turned it on, someone other than the person who proposed the write-back must approve it.
- **Changed values:** if the data changed after the write-back was proposed, the approval stops. Review the project and propose the write-back again.

Proposals, approvals, rejections and write-backs are all recorded in the signed audit trail.

Nothing is written to SAP Ariba or SAP S/4HANA until a buyer approves it.

Respond to a project

Submit a proposal

1. Go to **Projects**. Projects you are invited to appear here. Until a buyer invites you, the list is empty.
2. Open the project and read **RFP Details**.
3. In **My Proposal**, select **Submit Proposal**, enter your **Proposal Text** and select **Submit Proposal**.

If you win, the project shows that you have been awarded, and the RFP and your proposal are added to your document library.

Draft a response and check a contract

1. In **Skills** › **Draft Response**, paste the RFP section and your supplier profile, choose a tone, and run it. Edit the draft before you use it.
2. In **Skills** › **Check Compliance**, paste a contract to see policy items, a risk score and suggested redlines.
3. Add your own past proposals and capability documents to the document library to ground the drafts.

Ask the buyer a question

1. Open the project and go to **Q&A Thread**.
2. Type your question, choose the message type and send it. You see public messages and messages addressed to you.

Use the document library

The document library holds your organization's documents. Skills and Ask AI search it by keyword and show the sources they used. You see only your own organization's documents.

Add a document

1. Go to **Document Library** and select **Add Document**.
2. Choose a .docx, .pdf, .xlsx or .txt file up to 10 MB and select **Read Document**. Check the **Extracted Text Preview**.
3. Enter a **Title** and choose a **Document Type**: RFP, Proposal, Contract, Policy or Other.
4. Select **Add to Library**.

Find and remove documents

1. Type in **Search library...** to see matching passages with a relevance score.
2. Filter the list by type.
3. To remove a document, select its delete icon and confirm.

Documents also arrive from SAP Ariba and SAP S/4HANA syncs, and from awards. Past RFPs, winning proposals, policies and approved clauses give the skills the most useful context.

Administer Trident

Most of these tasks are in **Settings**, one page with a section for each area.

Give people access

1. In SAP BTP, assign each user the role collection for buyer, supplier or administrator.
2. In **Organisations**, select **Register Organisation** and enter the **Organisation Name**, **Type** (Buyer, Supplier, or both), **Industry** and contact email.
3. In **Users**, choose the organization and select **Invite User**. Enter the email, the **Organisation Role** and the **Functions** (Buyer, Seller), then **Send Invite**.
4. The invitation is accepted when that person first signs in. You can revoke a pending invitation.

Connect SAP Ariba and SAP S/4HANA

1. In **Settings** › **Data Source Integrations**, open **Configure Credentials** on the SAP Ariba card.
2. Enter the API details from your SAP Ariba API application and select **Save**, then **Test connection**.
3. On the SAP S/4HANA card, enter the system URL and communication user, and the company code and purchasing organization for new purchase orders. Select **Save**.
4. Select **Sync Events** and **Sync Contracts** on **SAP Ariba**, and **Sync POs** and **Sync Partners** on **SAP S/4HANA**.

Saved secrets are shown as ***. Leave them as *** to keep the saved value.

Register an MCP server

1. In **Settings** › **MCP Servers**, expand **Register an MCP server**.
2. Enter a lowercase **Name**, a **Title** and the HTTPS URL. Add a bearer token if the server needs one.
3. Turn on **Observer watches this server** to sync and index its data, then select **Test and register**.

The built-in servers for SAP Ariba and SAP S/4HANA are listed with their status. Use **Test** to check one.

Choose the AI model

1. In **Settings** › **AI Model**, choose a model from those available in the generative AI hub in SAP AI Core. Models that are not deployed are greyed out.
2. Select **Save**. All users and all skills use the new model.

Configure procurement policies

In **Settings** › **Procurement Policies**. The reasoner applies these rules. Each save creates a new policy version and an audit record.

SETTING	WHAT IT DOES
PO review threshold (net value)	Flags SAP S/4HANA purchase orders above this value
Contract expiry window (days)	Flags SAP Ariba contracts that expire within this many days
Sourcing event close window (days)	Flags SAP Ariba events that close within this many days
Compliance risk threshold (0–10)	A compliance check at or above this risk score becomes a high-severity finding
Observer schedule (minutes, 0 = off)	How often the observer runs on its own. At 0, start it with Run Observer now in Agent Activity
Run RFP analysis / compliance checks	Runs RFP analysis on new SAP Ariba sourcing events, and compliance checks on new or changed contracts. Off by default
Max AI runs per Observer cycle	Caps the automatic skill runs in one observer run
Four-eyes approval	Someone other than the proposer must approve SAP write-backs
Required contract clauses	Clauses every contract must have, one per line
Additional policy guidance	Free-text guidance for the reasoner, for example supplier preferences

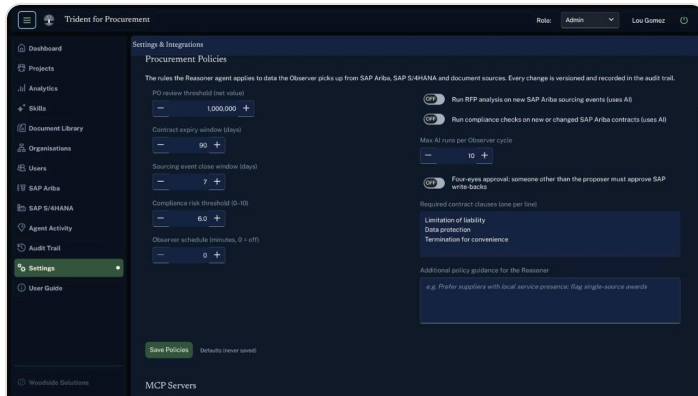
Select **Save Policies** to apply changes.

Review industry profiles

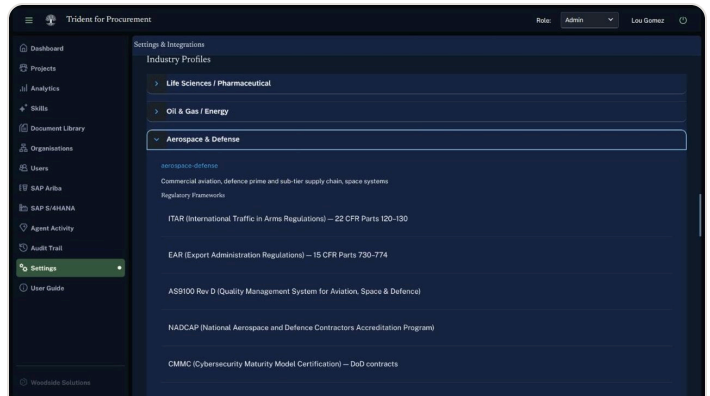
In **Settings** › **Industry Profiles**, expand an industry to see its regulatory frameworks, key risks, mandatory clauses, evaluation criteria and category examples. There are profiles for aerospace and defense, life sciences, and oil and gas. A profile applies when its industry is chosen on a project or skill.

Run the observer and review the audit trail

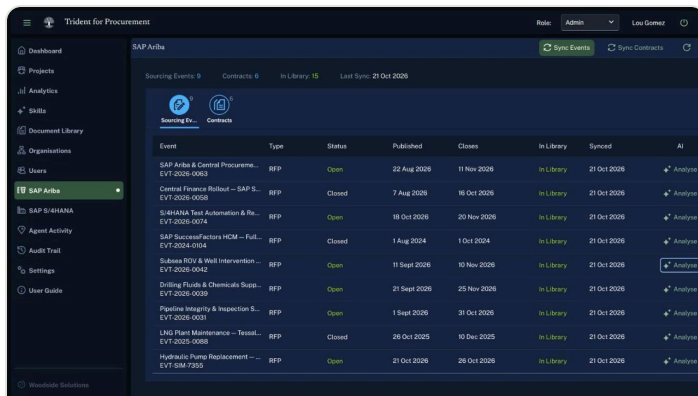
1. In **Agent Activity**, select **Run Observer now** to sync and check for changes straight away.
2. In **Audit Trail**, filter by action or outcome (Allow, Deny, Error). Each record shows the time, user, action, resource, outcome, details and its signature.



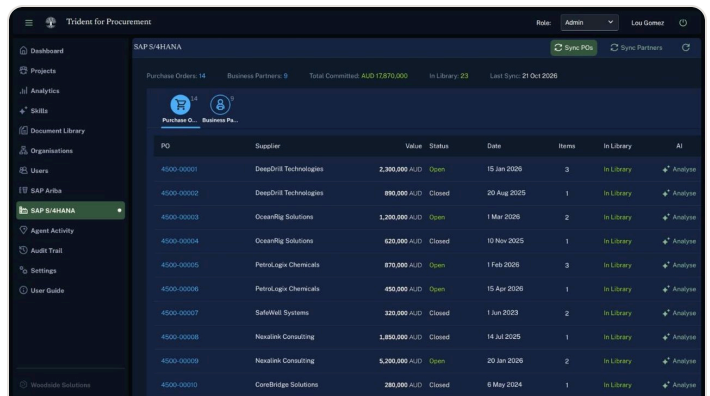
Sample data Procurement policies that the reasoner applies.



Sample data Industry profiles: the aerospace and defense frameworks.



Sample data Synced SAP Ariba sourcing events, ready to analyse.



Sample data Synced SAP S/4HANA purchase orders.

Get help

"You don't have permission"	Your role or organization membership doesn't allow the action. Ask your administrator to check your role collection and invitation.
No library sources used	The library has no documents that match. Add related RFPs, contracts and policies, then run the skill again.
Upload returns no text	Check that the file is under 10 MB and a supported type. Scanned PDFs without selectable text can't be read.
A project is missing	Check your role in the Role: list and the Status filter on Projects . Suppliers see a project only after they are invited.
Session expired	Trident shows a "Session expired" message. Sign in again.
Support	Email support@woodsidesolutions.com .